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TRUCKEE INCORPORATION FEASIBILITY STUDY

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Angus McDonald & Associates

Berkeley, California

TRUCKEE INCORPORATION FEASIBILITY STUDY

A Proposal For Services Prepared For

NEVADA COUNTY LOCAL AGENCY FORMATION COMMISSION

and

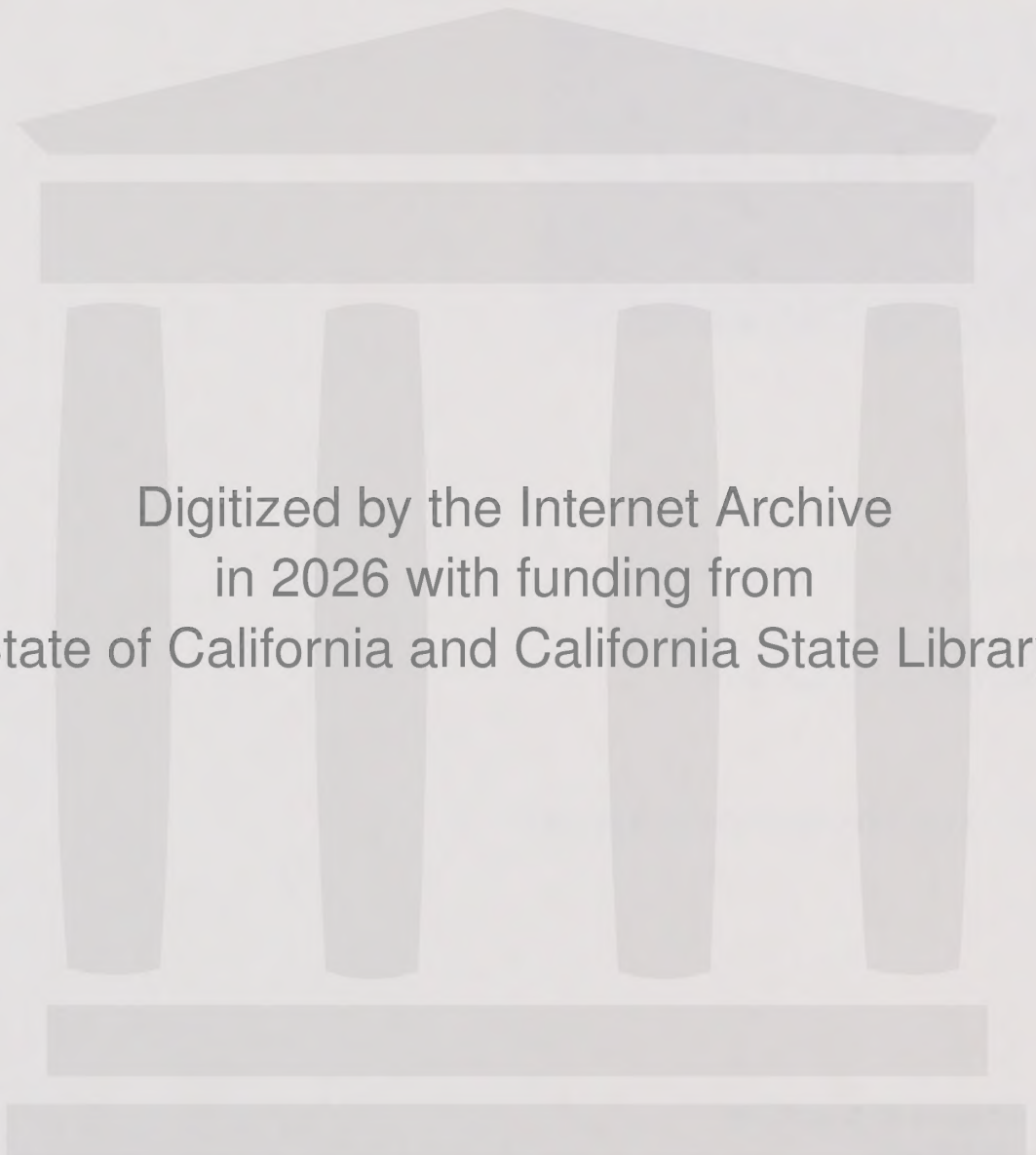
PLANNING FOR TOMORROW IN TRUCKEE

By

Angus McDonald & Associates
Berkeley, California

June 1991

91-1806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Angus McDonald & Associates

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June 14, 1991 **Via Federal Express**

Local Agency Formation Commission and
Planning For Tomorrow In Truckee
P.O. Box 6100
Nevada City, California 95959

Attention: Ms. Jan E. Hagel

Subject: Transmittal Of Scope Of Services
Truckee Incorporation Feasibility Study; 1806

Ladies and Gentlemen:

I am enclosing a proposal to prepare a comprehensive fiscal analysis and Initial Environmental Study for the proposed incorporation of Truckee.

The process of creating a new city in California in the 1990s involves a unique combination of community involvement and adversarial relationships! Community involvement is essential to a successful incorporation. Adversarial relationships are almost unavoidable, since the revenue base for a new city comes from some other governmental entity -- particularly, the affected county -- giving up some of its revenue base. An incorporation feasibility study must be done with great sensitivity and must be done by appropriately-trained experts who could be qualified as such in a court of law, if this ultimately became necessary.

Angus McDonald & Associates has assembled a team that would have the appropriate qualifications, whatever the outcome of the feasibility study for a city of Truckee. The team is experienced and motivated having recently completed three comparable assignments. We would be happy to discuss our proposal with you in greater detail.

Yours very truly,

ANGUS McDONALD & ASSOCIATES, INC.

Angus N. McDonald

Angus N. McDonald
ANM:crg
Enclosure

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I. TECHNICAL APPROACH

The present chapter describes Angus McDonald & Associates' overall approach to preparing a feasibility study and comprehensive fiscal analysis for a new city in California. Chapter II contains a description of the specific tasks that would be completed.

A. Philosophy And Approach

Since the passage of Proposition 13, the demands placed on a municipal incorporation feasibility study have increased considerably. Before Proposition 13, a new city could select its own property tax rate and could, if necessary, correct for excessively optimistic assumptions that may have been included in the fiscal feasibility study. After the passage of Proposition 13, city councils no longer have this authority. (In fact, the elimination of the threat "They'll raise my taxes if we incorporate!" is generally believed to be the primary reason why the number of cities in California has increased rapidly since 1978.)

However, lack of ability to adjust taxes puts a significantly greater burden on the authors of the feasibility study. They have only one chance to be correct!

Beyond that fact, all of the revenues received by a new city come at the expense of some other government in California. In some cases (e.g., vehicle license fees), there is a slight reduction in the amount of revenue available to all the other cities in California even though there is significant increase in the revenues available to a single new city. Unfortunately, in very significant cases, the only loser is the county, which must transfer revenues to the new city. Significant examples are a county's loss of property tax and sales tax when a new city is created.

Accordingly, it is very difficult to avoid an adversarial relationship between county government and the proponents of incorporation.

It is the responsibility of the Local Agency Formation Commission (LAFCo) to control and balance this adversarial relationship and, in this case, to meet statutory responsibility to consider the best interests of all the local governments in Nevada County -- special districts and the county itself, as well as the proposed new City of Truckee. The only force that exists that properly can look solely to the interests of the new city is the proponents of incorporation! Angus McDonald & Associates feels strongly that the role of the feasibility consultant is to act in a proper and professional manner at all times but to act as though they were the city manager of the new city. The feasibility study should produce a factual evaluation of the new city, but should be formulated from the point of view of the new city. The consulting team will provide honest and factual information to all parties -- including any oponents to incorporation who may emerge. At times when an exercise of judgment is required, the judgment will be made from the perspective of the new city.

A specific example concerns the selection of municipal boundaries. The consulting team will make recommendations that would be of advantage to the new city. At the same time, they will answer any questions and explain the results of decisions should alternate boundaries be selected.

B. Required Expertise

As noted above, certain aspects of creating a new city in California is almost unavoidably adversarial. There are currently at least four examples in California where counties and Local Agency Formation Commissions are being sued by new cities or where litigation is in preparation. The subject of the litigation is whether the correct amount of property tax was transferred from the county to the new city.

In other cases, affected interest groups (e.g., the Deputy Sheriff's Association) have hired their own experts to prepare critical comments on proposed incorporations. Finally, any interested citizen who is prepared to support his or her request financially can ask the Office of the State Controller to review an incorporation feasibility study.

In this environment, it is important to have appropriately-skilled experts who can be qualified as such in a court of law, if that becomes necessary. The team proposed Angus McDonald & Associates will have three classes of experts.

- Angus McDonald & Associates will provide expertise in issues of government organization, public service delivery, and forecasting of municipal revenues and expenditures.

- Frederick Geier will provide expertise on the requirements of an Initial Environmental Study as defined in the California Environmental Quality Act (CEQA). (Mr. Geier will also participate in defining alternate boundaries for the proposed city and producing a reasonable forecast of growth and development.)

- A Certified Public Accountant will approve the calculation of Nevada County's cost for municipal-type services in the year prior to incorporation. The validity of this finding is crucial to the validity of the fiscal feasibility study. As noted above, controversy over this finding in other jurisdictions has led to litigation.

C. Objectives For The Initial Environmental Study

It is clear that, in some circumstances, the act of creating a city is a "project" within the meaning of the California Environmental Quality Act (CEQA). Accordingly, environmental review is required. The scope of such a review must be defined extremely

carefully. There can be a temptation to wander off into extremely conjectural subject areas, where one is conjecturing about what a not-yet-existent city council might or might not do! Such off-the-subject conjecturing does nothing to preserve the environment and succeeds only in enriching the environmental consultant and impoverishing the proponents of incorporation.

Every effort will be made to produce an Initial Study that can be used to support a Mitigated Negative Declaration. Those matters of environmental concern that are relevant to the act of incorporation can be addressed. Issues that will be addressed later in subsequent environmental documents, if the city is created and if development occurs, can be addressed at that time, rather than in the environmental documentation on the act of incorporating a city.

A carefully-considered and adequately-funded Initial Study has been proposed in the present proposal. It is described in more detail in the Attachment to the proposal. The intent is to make every effort to produce a document that is truly relevant to incorporation and that can be used as the basis for a Mitigated Negative Declaration. The expense of a largely useless Environmental Impact Report can thus be avoided.

D. Technical Issues

Certain issues of a narrow and more technical nature are discussed in the following paragraphs.

1. Time Period

The Government Code now specifies that a feasibility study consider a time period of three years. This will be done, since it is a statutory requirement, but a three-year time period is inadequate to illustrate fully the short-term and long-term aspects of fiscal feasibility. Instead, a time period of either seven or eight years is necessary to separate long-term from short-term fiscal effects.

The first departure from a city's ultimate fiscal situation results from the fact that State law requires the county to continue to provide and pay for the cost for municipal services from the date of incorporation through the end of the new city's first fiscal year. Some, but not all, of the revenues begin to accrue almost immediately to the new city, but the new city is not required to pay for municipal-type services until after the end of its first fiscal year. The second non-permanent fiscal effect is that a new city may be required to repay the county for services paid for during this first fiscal year. Nevada County's Resolution of Application indicates that this requirement will be imposed. The new city has five full fiscal years after the first fiscal year to complete this obligation.

Finally, a very significant advantage accrues to new cities for their first five fiscal years. Certain significant revenues that are shared between the State of California and cities and counties are distributed in accordance with a formula that depends in whole or in part on the population of local governments. California law specifies that for up to five years a city can use an estimate of population equal to three times the number of registered voters for so long as this produces an advantage for the new city. It is typically the case -- and is the case in Truckee -- that this estimated "population" is significantly higher than the true resident population. The cumulative effect of all of these short-time phenomena is not over until the end of the sixth fiscal year (assuming that the first fiscal year is a full twelve months) or the end of the seventh fiscal year if the city incorporates after July 1.

Accordingly, the final conclusion about whether revenues will support the cost of providing public services should be made as of Year 7 (or Year 8, as appropriate). A new city should not be considered fiscally feasible unless it can support the cost of public services after the time when an advantage gained through the workings of State law is available to the city.

In summary, all exhibits will include a cumulative analysis through Year 3 (as required by State law), but will extend the time period to seven (or eight) years to evaluate fully the feasibility of the study.

2. Growth Forecast

Since a multi-year period for fiscal analysis is being recommended, it is appropriate to consider the growth that can be expected in Truckee during that time period. The proponents of incorporation should be able to present to the voters a realistic estimate of what actually can be expected to occur in Truckee.

At the same time, an alternate analysis should be prepared that does not depend on growth. In most circumstances it would be inappropriate to encourage incorporation if financial feasibility depended on growth that may not occur or may not occur at the rate expected. A series of "planned growth" and a "no-growth" financial exhibits will be prepared.

3. "Post-LAFCo" Report

A Local Agency Formation Commission has very broad powers to specify terms and conditions for incorporation. It is quite typical, if a LAFCo approves an incorporation proposal, that the approval involve a city that differs in either government organization or in boundaries, compared to the original application.

It is quite important that the fiscal feasibility study available to the voters during an incorporation election campaign reflect a city that meets the description approved by LAFCo. An "addendum" to the feasibility study is a source of confusion and is subject to possible misuse by the group which will inevitably form to oppose municipal incorporation. Accordingly, the Scope Of Services provides for an update and production of a "stand-alone" report that truly reflects the actions taken by LAFCo.

E. Ancillary Services

The consulting team offers a service to LAFCo and, in particular, to PTT for which no additional cost will be charged! The members of the team enjoy incorporation feasibility studies and have observed successful and unsuccessful incorporation efforts throughout California. This experience will be available to the supporters of incorporation throughout the project. Advice and counsel will be given whenever this would be of interest to the citizens of Truckee.

II. WORK PROGRAM

The feasibility study and comprehensive fiscal analysis will be completed in a total of ten tasks.

Task 1: Define Alternate City Boundaries

Task Purpose: The citizens of Truckee are clearly interested in the issue of municipal boundaries. The purpose of the present task is to produce alternate boundaries that will both meet community objectives and illustrate the fiscal differences of alternate boundaries.

Task Execution: A memorandum will be prepared discussing the fiscal and governmental effects of alternate boundaries. Relevant issues include: ability to control land uses, responsibility to maintain the streets that are included within the city limits, and significant fiscal effects that are very specific to geography. (An outstanding example in Truckee involves whether or not the California Highway Patrol Inspection Station is included in the city limits so that "State Officer in City" Vehicle Code fines accrue, in part, to the new city.

The Tax Rate Area (TRA) maps that are used by the California State Board of Utilization to monitor property tax collections in California will be assembled for the Truckee area. A composite map for the outer limits of the alternate boundaries that are being considered will be assembled.

This map will be used in the workshops described below to consider alternate boundaries and to define up to four alternative boundaries. After the boundaries have been defined, the same maps will be used both to calculate change in property tax for the new city and to request information about taxable retail sales within each alternative boundary.

The two workshops that are specified in the Request For Proposals will provide an excellent vehicle for receiving the input that is necessary to select reasonable boundary alternatives.

After each boundary map has been defined, the cooperation of members of PTT will be requested. Members who are familiar in detail with local circumstance will be asked to note on each boundary map the limits of street addresses (or other identifiers) of property that is included in the city. This level of detail is essential for the representative of the State Board of Equalization who will estimate taxable retail sales within the boundary.

An upper limit of four alternative boundaries is recommended, because each alternative significantly increases the effort that will be required. The effort on the part of the consulting team is manageable, given modern practice regarding the use of linked computer

models, but the effort required of two other agencies not under the control of LAFCo or PTT can go up to an unacceptable level. In particular, two key groups may object to considering more than four alternate boundaries:

- o County officials who are now responsible for municipal-type services (e.g., the Sheriff) will be required to estimate their cost within each of the alternative boundaries that is considered.

- o A representative of the California State Board of Equalization will be asked to estimate separately the taxable retail sales that are accruing within each of the alternative boundaries.

Task Products. The effort will produce one composite Tax Rate Area map for each alternative, with the boundaries clearly delineated on the map.

Task 2: Prepare Growth Forecast For Each Alternative

Task Purpose: As noted previously, a time period for analysis of up to eight years is necessary to produce a valid fiscal feasibility study for a new city. It would be unrealistic and possibly confusing to the readers if Truckee were assumed to remain in a static state for that long a period. The purpose of the present task is to present a reasonable forecast of growth over the time period for each boundary alternative that is considered.

Task Execution: A reasonable forecast of growth and development will be prepared for each boundary alternative. This forecast will be based primarily on key informant interviews with county staff, with members of PTT, and with realtors and developers active in the area. Every effort will be made to avoid disaggregating the forecast spatially within the boundary of Truckee. Some disaggregation may be necessary if a city of Truckee's share of the property tax varies significantly within its boundaries. (Whether or not this variability exists will be known at the conclusion of Task 5.)

Task Products: The product of the task will be a growth forecast for each boundary alternative.

Task 3: Prepare Public Services Plan

Task Purpose: A valid and usable feasibility study requires documentation of assumptions about the services the new city will actually provide. This is particularly important in the case of Truckee because of the strong role played historically play by two-county special districts. The initial recommendation of Angus McDonald & Associates is that a single "best judgment" set of assumptions about responsibility for public services be used for all

boundary alternatives. If alternative forms of government structure are superimposed over four alternative boundaries, one's ability to comprehend rapidly diminishes!

This recommendation is subject to revision if, during Task 1, it became obvious that the future of one or more special districts is of vital concern to the community.

Task Execution: This task will represent an exercise in professional judgment, guided by attitudes and opinions that were guaged during the two public workshops that were conducted in Task 1.

Task Products. The effort will produce a description of responsibility for all public service providers. The list of services provided by the new city will be presented in great detail. This list will be used in Task 4 to assure that the comparable cost to Nevada County is included in the evaluation of cost of county services.

Task 4: Estimate Nevada County's Cost And Savings

Task Purpose: One of the most important and certainly the most controversial findings in an incorporation feasibility study is the finding as to the county's cost to provide services that will subsequently be provided by the city. As specified in Government Code § 56842, the amount of property tax transferred initially to a new city is a percentage of the county's cost for the services for which the city will take responsibility. (The applicable percentage is calculated as Nevada County's property tax revenues, expressed as a percentage of all revenues that are available to Nevada County for general purposes [i.e., are not restricted to specific uses such as State grants for welfare].)

The Government Code clearly specifies that LAFCo is to make a determination of costs. Affected department heads quite understandably have a tendency to interpret the requirement as "savings." It is, unfortunately, frequently the case that the true total cost cannot be avoided when the county is no longer responsible for a municipal service. As one hypothetical example, it may not be practical to adjust the Sheriff's pattern of beats and patrols such that the cost can be reduced by an amount equal to the current cost for serving Truckee.

Accordingly, the purpose of the present task is to produce a true and valid estimate of cost (as well as a true and valid estimate of practical savings that can be achieved by the county) that will withstand scrutiny and potential controversy.

Task Execution: An initial workshop will be requested, with participation from the following agencies or offices:

- Local Agency Formation Commission
- County Administrative Officer
- Auditor-Controller

The purposes of the task and the technical approach will be presented in detail. Emphasis will be on the difference between cost and savings and on the intent to include in the calculation of cost:

- The direct cost for providing municipal-type services;
- The departmental overhead applicable to these direct costs;
- The countywide indirect overhead applicable to direct costs plus departmental overhead.

Interviews will be held with affected county departments to determine the direct cost to serve Truckee, for each boundary alternative. These interviews will also be used to evaluate Nevada County's practices regarding departmental overhead. The interviews will also be used to obtain an estimate of the portion of direct costs that can actually be realized as savings, if a County department is no longer responsible for providing a service in Truckee.

An evaluation and classification of Nevada County's revenues will be prepared to permit the calculation described in Government Code § 56842(c)(1).

A second workshop will be scheduled with the same participants who attended the first workshop. A draft of the task report will be made available sufficiently far in advance of this meeting to permit a meaningful discussion.

Comments received during the workshop will be incorporated into a final version of the task product.

Task Products: The results of Task 4 will be incorporated into a separate report signed by the consulting team's Certified Public Accountant.

Task 5: Prepare Revenue And Expenditure Estimates

Task Purpose: Task 5 will produce the technical substance of the conclusions about financial feasibility. The purpose of the task is to produce the numerical estimates of

revenues and expenditures for each significant budget line item in a budget for the proposed city. A second purpose is to produce quantitative estimates of revenue and expenditure changes for other agencies (e.g., Nevada County) that would be affected by incorporation.

Task Execution: Estimating relationships will be prepared for each significant revenue item and for each significant item of expenditure. The two classes of estimating relationships are fundamentally different in character.

Revenues in California respond to land use decisions and to external economic conditions. Revenues are amenable to computer modeling. Models range in complexity from the very straightforward per capita estimating relationship for Vehicle License Fees to the complexities necessary to simulate the effects of Proposition 13. Examples of this complexity include:

- Taxable value increases at no more than 2 percent per year until a change of ownership occurs;

- The portion of growth in taxable value that accrues to a new city of Truckee can depend critically on which Tax Rate Area (TRA) within the city in which the growth occurs. (Other new cities incorporated since Proposition 13 have shown an unavoidable variability as high as 2:1 depending on whether development occurs in a TRA that has a low or a high Tax Apportionment Factor [TAF].)

Expenditures, on the other hand, respond to administrative and legislative decisions rather than directly to economic forces. A decision is made, for example, about the level of staffing in the city manager's office or the targeted level of street maintenance. Only after these decisions have been made an an estimate of cost be prepared.

The assumptions about staffing and level of service will represent the judgment of the consulting team. Additional guidance will be available from practice in the comparable cities that are selected in Task 6. The estimating relationship will be applied to each boundary alternative, and estimates of revenues, expenditures, and fund balances will be prepared for the proposed city's General Fund and Fuel Tax Fund.

Task Products: The task will produce for each boundary alternative:

- Tax Apportionment Factors for each TRA;

- Tabular materials that show year-by-year revenues, expenditures, and fund balances for the General Fund and Fuel Tax Fund;

- Supporting exhibits presenting such items as the one-time or "start-up" costs that must be spend by a new city (e.g., for furniture, for the first General Plan, for executive search fees for key city officials);

- A technical appendix that describes in detail the assumptions underlying each the estimating relationship for each significant revenue and expenditure line item.

Task 6: Prepare Analysis Of Comparable Cities

Task Purpose: The purpose of the task is to identify two or three cities that would be comparable to a city of Truckee. The staffing plan and budget of these cities will be used as a "reality check" for the conclusions from Task 5.

Task Execution: Cities comparable in size and responsibility for delivery in service will be selected from the State Controller's Report. Ideally, the same comparable cities can be used for all of the Truckee boundary alternatives. If necessary, given the variability of the size of Truckee assuming one or another boundary, additional comparable cities will be selected.

The selection process will reflect the professional judgment of the consulting team, confirmed if necessary by telephone discussions with members of the City Manager's Office in the candidate comparable cities. Careful attention will be paid to the ways in which a "comparable" city might not, in fact, be comparable to a city in the Central Sierra.

Task Products: The task will produce budgetary experience expressed in absolute amounts and in terms of cost or revenue per person served for cities that are comparable in size and service responsibility to the alternative proposals for a city of Truckee.

Task 7: Prepare Community Review Draft Report

Task Purpose: One purpose of the task is to assemble all of the materials completed to this point into a comprehensive report. A more demanding task purpose is to provide text and graphic materials that will make this report accessible and understandable to an audience of non-specialists.

Task Execution: Appropriate text, tables, and graphics will be assembled into an Administrative Draft Report. This Administrative Draft will be reviewed with LAFCo staff and with representatives of PTT. After this review, a publication copy of the Report will be prepared.

Task Products: The product of the task is a Report describing the fiscal feasibility of alternative boundaries for Truckee that will be accessible to a wide community audience.

Task 8: Prepare Final Report

Task Purpose: The purpose of the task is to reflect input received from community comment and to produce a report that can be transmitted to LAFCo to start the incorporation process.

Task Execution: Members of the consulting team will meet with LAFCo staff and representatives of PTT to discuss any changes that are appropriate after community comments have been received and evaluated.

A revised report will be prepared and will be circulated for a last round of comments from LAFCo and PTT representatives.

A Final Report of alternative boundaries for Truckee will be prepared.

Task Products: A Final Report regarding the fiscal feasibility of alternative boundaries for Truckee will be produced.

Task 9: Prepare "Post-LAFCo" Report

Task Purpose: As noted previously in this proposal, it is important that voters in Truckee have available a report that goes the next step beyond the presentation of alternatives and that reflects the proposed city that is actually approved by LAFCo for consideration by the voters. The purpose of the present task is to produce such a report.

Task Execution: The description of this task assumes that LAFCo approves a proposed city to be considered by the voters. If this proposed city differs from one of the alternatives that was presented, then it will be necessary to adjust the boundaries to reflect the description of the proposed city that is actually approved by LAFCo.

Task Products: The task will produce a report that is comparable to the report that was produced in Task 8 but that deals only with the proposed city as actually approved by LAFCo.

Task 10: Meetings And Hearings

The budget provides for two appearances at community meetings or LAFCo hearings. These meetings are in addition to the two meetings that were included in Task 1 and in addition to the necessary time spent in the field interviewing County departments, etc.

III. STAFFING PLAN AND BUDGET

A. Staffing Plan And Budget

The staffing plan and budget for the Truckee incorporation feasibility study is shown in Table III-1. The staffing plan was considered carefully to assure that all the experience available from the consulting team regarding incorporation feasibility studies would be available to LAFCo and PTT.

B. Payment Schedule

Services would be provided on a time-and-material basis. The total project cost of $34,200 from Table III-1 is a guaranteed maximum through the production of the "Post LAFCo" Report and production of an Initial Environmental Study. If less effort is required than that shown in Table III-1, then the total final cost would be less.

Services would be billed on a monthly basis, together with a report of progress during the month.

Table III-1

STAFFING PLAN AND BUDGET
TRUCKEE INCORPORATION FEASIBILITY STUDY

		TOTAL FEE	TOTAL HOURS	STAFF HOURS McDonald $125	Senior Associate $100	Associate $75	Analyst $50	Word Processing $40
Task 1:	Define Alternate City Boundaries	$2,100	20	4	16			
Task 2:	Prepare Growth Forecast For Each Alternative	$2,100	20	4	16			
Task 3:	Prepare Public Services Plan	$1,700	20	4		16		
Task 4:	Estimate Nevada County's Cost And Savings	$2,900	44	4	8		32	
Task 5:	Prepare Revenue and Expenditure Estimates	$2,900	44	4	8		32	
Task 6:	Prepare Analysis of Comparable Cities	$900	12	4			8	
Task 7:	Prepare Community Review Draft Report	$3,430	50	6		24	8	12
Task 8:	Prepare Final Report	$2,420	36	4		16	8	8
Task 9:	Prepare "Post-LAFCo" Report	$2,820	44	4		16	16	8
Task 10:	Meetings and Hearings	$2,000	16	16				
	TOTALS	$23,270	306	54	48	72	104	28

EXPENSES		
Initial Environmental Study		$5,800
Certified Public Accountant		$3,000
Copying and Printing		$286
Telephone		$250
Travel		$1,000
Miscellaneous		$400
Subtotal		$1,936
Administration	10.0%	$194
TOTAL EXPENSES		$10,930
TOTAL FEES		$23,270
TOTAL BUDGET		$34,200

ref: 33403.73

IV. STATEMENT OF QUALIFICATIONS

A. The Proposed Team

Angus N. McDonald would have overall responsibility for the project and would be involved in each of the Tasks. He would play the leading role in selecting comparable cities and in reviewing the staffing plan and expenditure estimates for each boundary alternative. He would draft the recommended terms and conditions and would be the primary resource for experience in municipal incorporation efforts elsewhere in California.

Mr. McDonald is one of California's experienced practitioners in fiscal analysis, in general, and in incorporation feasibility studies, in particular. He has been responsible for all of his firm's incorporation feasibility studies that have been completed since the passage of Proposition 13. He was the invited speaker at the California Association of LAFCo's meeting in 1981 to discuss the requirements for an incorporation feasibility study, after the passage of Proposition 13 and Assembly Bill 8, the permanent implementing legislation for Proposition 13.

Mr. McDonald is both a Professional Engineer and a Certified Planner. He has qualified as a full Member of the Operations Research Society of America.

José Larios will be responsible for the calculation of revenues and expenditures for each boundary alternative. He will contribute throughout the project and have the responsibility for assembling the project documents.

Mr. Larios has recently completed exactly comparable assignments regarding the proposed incorporations of American Canyon (Napa County) and Oakley (Contra Costa County). He has contributed to more than twenty fiscal studies during his time at Angus McDonald & Associates and has made significant improvements in certain of the computer models used to calculate public agency revenues.

Frederick Geier will be responsible for the Initial Study. The scope of the Initial Study and additional documentation on Mr. Geier's qualifications are presented as an attachment to the present proposal.

In addition to his responsibility for the Initial Study, Mr. Geier will apply his detailed knowledge of the area and contribute to the definition of alternative geographic boundaries for the city.

A **Certified Public Accountant** with a practice in Nevada County will be selected as the fourth key member of the team. This individual will direct the efforts to evaluate Nevada

County's costs for providing services and will supply an opinion that this cost has been calculated in a correct and valid manner.

References for the proposed team are shown in Table IV-1.

B. Project Experience

The following paragraphs represent examples of Angus McDonald & Associates' experience. One or more of the individuals who would be available to consult on the Truckee Incorporation Feasibility Study participated in each of the projects listed below.

The project descriptions are in three groups:

Group 1: Projects where a comprehensive fiscal evaluation of a proposed city was completed.

Group 2: Projects where Angus McDonald & Associates was retained to provide a critique of one or another aspect of municipal incorporation, on behalf of an interested party.

Group 3: Projects that demonstrate Angus McDonald & Associates' general capability in forecasting municipal expenditures and revenues.

GROUP 1:

Lagoon Valley Fiscal Impact Evaluation

The City of Vacaville authorized the preparation of a Specific Plan and Environmental Impact Report for the Lagoon Valley area. This Specific Plan would accommodate two million square feet of office development, of which 1.2 million square feet would be occupied by a major financial institution. In addition, a new hospital was planned. As part of a team, Angus McDonald & Associates was responsible for a fiscal impact evaluation of this Specific Plan and a financing plan for the necessary additional school capacity.

Moorpark Incorporation Feasibility

Ventura County Local Agency Formation Commission retained Angus McDonald & Associates to evaluate the fiscal feasibility of an incorporated City of Moorpark. The evaluation considered district consolidation, boundaries and timing of incorporation. The analysis considered the question of fiscal feasibility under two different growth rate

Table IV-1

REFERENCES FOR THE TEAM

Angus McDonald & Associates

Project	Reference
Moorpark Incorporation	Robert Braitman, Executive Officer Ventura County Local Agency Formation Commission (805) 654-2575
Castro Valley Incorporation	Bruce Kern, Principal Analyst (Former Executive Officer Alameda County LAFCo) (415) 272-3861
Union City 511 Area Financing Plan	Mark Leonard Community Development Director City of Union City (415) 471-3232
American Canyon Incorporation	Charles Wilson, Executive Officer Napa County Local Agency Formation Commission (707) 253-4805

Geier & Geier Consulting, Inc.

Mr. Tom Parilo, Planning Director
Mr. David Shpak, Planner
County of Nevada Planning Department
(916) 265-1440

Mr. Rob Kautz
General Manager
Sugar Bowl Ski Corporation
(916) 426-3651

Ms. Joanne B. Roubique, District Ranger
Mr. Rick Maddalena, Planning Specialist
Truckee Ranger District
(916) 587-3558

estimates. The first estimate was based on a market study conducted by Angus McDonald & Associates while the second estimate used lower interest rates available for financing development. Capital improvements financing was also reviewed. Terms and conditions were recommended. The staffing plan and budget recommended by Angus McDonald & Associates continues to guide the new City.

Municipal Incorporation -- East Palo Alto

Angus McDonald & Associates was retained by San Mateo County LAFCo to complete a Sphere of Influence study. The key issue addressed in this study was the feasibility of incorporation versus other organizational alternatives to East Palo Alto. The evaluation considered the feasibility under several alternative boundaries as well as alternatives to incorporation. (The alternatives to incorporation included annexation to Menlo Park, and annexation to Palo Alto after the appropriate change in the San Mateo-Santa Clara County boundary.) The costs of providing municipal services were estimated for each of the alternatives. Similarly, the revenues were projected for each boundary alternative. Angus McDonald & Associates participated fully in all public hearings and in defining terms and conditions. The initial election led to defeat by a very narrow margin. LAFCo waived the two-year delay requirement, and incorporation was approved in a subsequent election one year later. After incorporation was approved, the firm participated in a task force effort to effect a successful implementation.

Incorporation Feasibility Study of West Sacramento

Angus McDonald & Associates analyzed current levels of service delivery, current revenues and development potential and impact on Yolo County of a proposed new City of West Sacramento. A service and staffing plan analysis of six comparable cities was prepared, both as a guide in formulating an assumed public service plan for the new City and to provide a way of validating the consultant's conclusions against the real experience of other newly incorporated cities. An analysis was made of the current County facilities in the area, and their suitability for continued use for City or joint City/County offices and other functions. The proposed incorporation would have a substantial impact on the County, and a variety of mitigation measures were proposed.

Solvang Incorporation EIR

Angus McDonald & Associates was part of a team retained by Santa Barbara County to complete the fiscal analysis component of the EIR for the proposed Town of Solvang. The detailed analysis included five-year revenue projections, a public services plan, and a lengthy discussion of mitigation measures. These mitigation measures focused on the major ongoing fiscal impact that the proposed incorporation would have on Santa Barbara

County, and the effect on governmental organization options for the surrounding unincorporated communities.

Goleta Incorporation Environmental Impact Report and Economic Feasibility Study

The Goleta area contains a population of nearly 65,000 and represents the largest concentration of urbanization within the unincorporated portion of Santa Barbara County. Angus McDonald & Associates was responsible for preparing the Environmental Impact Report (EIR) and economic feasibility study for a proposal to incorporate the Goleta area.

The EIR focused on the proposal's fiscal impact on the County and evaluated the feasibility of the future city in terms of its ability to provide municipal services. The EIR serves as an important informational document for the Santa Barbara County Local Agency Formation Commission (LAFCo) in its determination on the incorporation proposal.

Feasibility Of Municipal Incorporation Of Rancho La Costa (La Costa Land Company)

Angus McDonald & Associates analyzed the feasibility of Rancho La Costa becoming an incorporated city. The analysis considered the administration requirements and the public service costs, and the revenues associated with municipal incorporation of schedule of capital investment requirements and budget estimates for future years were prepared. This analysis also considered the consistency of municipal incorporation with policies and intentions of the Local Agency Formation Commission and the impact of incorporation on the La Costa Land Company. At the conclusion of the technical analysis, recommendations were presented to the client suggesting that the preferred alternative to municipal incorporation would be an annexation to the City of Carlsbad.

Feasibility Study -- City of American Canyon

Angus McDonald & Associates was retained by the American Canyon Incorporation Committee to prepare a comprehensive fiscal analysis of incorporation for the American Canyon area in Southern Napa County. The feasibility study considered alternate boundaries that had been requested by the Local Agency Formation Commission (LAFCo) and considered alternate rates of growth. A full set of terms and conditions for incorporation was recommended. The feasibility study was ultimately accepted by the LAFCo Executive Officer.

The feasibility study was, in effect, a sequel to a feasibility study that Angus McDonald & Associates had done ten years earlier, during the first attempt to incorporate American Canyon.

Technical Assistance for Templeton Incorporation

Angus McDonald & Associates provided technical assistance to the principal consultants who prepared an environmental and fiscal impact analysis of a proposed municipal incorporation of the Templeton area in San Luis Obispo County. The principal areas of technical assistance were those aspects of the fiscal study that are unique to an analysis of municipal incorporation, such as the details of the property tax transfer from the County to the proposed city, and the terms and conditions (e.g., Gann appropriations limit) that would accompany approval of a municipal incorporation.

Castro Valley Incorporation Feasibility Study

Angus McDonald & Associates prepared two successive incorporation feasibility studies for the Castro Valley area of Alameda County. The area is predominantly developed, with few opportunities to improve the tax base. Accordingly, the question of feasibility hinged on the amount of property tax that would be transferred from Alameda County. This amount, in turn, depended on the estimate of the County's cost for providing services that would subsequently be assumed by the City of Castro Valley. An additional complication involved whether the fire district serving the area would become a subsidiary district of the City of Castro Valley. The ultimate consultant's recommendation was that the Alameda Local Agency Formation Commission require as a condition of approval that the voters would approve a tax for general purposes that would assure an adequate tax base.

Oakley Incorporation Feasibility Study

Angus McDonald & Associates was retained to evaluate the feasibility of creating a city the Oakley area, in Eastern Contra Costa County. A comprehensive cost-revenue study was conducted for Oakley with a planned level of growth and for Oakley at its present levels of population and employment. A conclusion was presented that Oakley, as it now exists, could support cityhood but with little improvement in the level of service. If Oakley grew as planned, a considerably level of law enforcement could be financed from the improved tax base. Terms and conditions for incorporation were recommended.

GROUP 2:

Orinda Property Tax Transfer

The newly-incorporated City of Orinda was concerned that the amount of property tax that it received after incorporation had been calculated incorrectly. Angus McDonald & Associates was retained to evaluate the calculations that had been done by the Contra Costa Local Agency Formation Commission and by the County Auditor-Controller. The consultants' preliminary conclusion was that the property tax transfer amount had been understated and that the City's Tax Apportionment Factors had been calculated in a way that was very subject to incorrect. Angus McDonald & Associates recommended that a qualified Certified Public Accountant be retained to produce a revised cost accounting that could, if necessary, be the subject of expert testimony in court. This was done and the understatement was confirmed. Angus McDonald & Associates provided a methodology and an example for correction of the City's Tax Apportionment Factors.

Critique of Proposed Citrus Heights Incorporation

The Sacramento County Deputy Sheriff's Association was concerned that certain aspects of the approval process for the proposed City of Citrus Heights had been done incorrectly. Angus McDonald & Associates was retained to prepare a critique of the incorporation process and the terms and conditions. After evaluation, the conclusion was reached that one of the LAFCo terms and conditions was subject to multiple interpretations that produced significantly different results.

Atascadero Property Tax Transfer

The City of Atascadero was incorporated as a City during the time period after the passage of Proposition 13, but before a clear and permanent solution was established for transferring the property tax base to a new City from the County and special districts whose service responsibility was assumed by the City. Although the original property tax transfer to Atascadero was carried out in complete good faith by all participants, the effects of this transfer became of increasing concern to the City. San Luis Obispo County officials expressed a willingness to consider adjustments to the City's property tax base. Angus McDonald & Associates assisted the City of Atascadero in evaluating the rationale applied to the circumstances that guided the original transfer. It also assisted the City in considering alternative approaches that might have lead initially or might lead now to a different City property tax base. The consultants provided staff assistance to the Atascadero City Manager during a series of negotiations that eventually led to an increase in both the City's base amount of property tax revenues and the factors that are used to

allocate the annual change in taxable value to the City. The results of the negotiations were ultimately acceptable to all parties.

GROUP 3:

Fiscal and Financial Analysis - Gateway Specific Plan

Angus McDonald & Associates was part of the team that prepared the applicant's proposal for a Specific Plan for Orinda's Gateway Valley. The applicant's team worked cooperatively but independently from the EIR team that has been retained by the City of Orinda. The effort may become a model for cooperative development of a land use plan, while preserving complete independence in reviewing the impact of this plan.

Angus McDonald & Associates prepared a baseline fiscal forecast for Orinda and a fiscal impact analysis for alternative Specific Plans. The firm was also responsible for preparing a complete financing plan and recommending any fiscal mitigation measures that may be required.

Davis General Plan Revision

Angus McDonald & Associates, as part of a team, participated in an effort that successfully integrated fiscal analysis and comprehensive public facilities financing into a General Plan revision program. The firm tailored its fiscal model to meet the specific circumstances applicable to Davis. One powerful feature of the model was to directly address the question of which land use mix was most fiscally advantageous to the City. Three alternative sketch plans were tested for the impact on Davis' ability to collect revenues sufficient to finance the expansion of ongoing municipal services. Additionally, required capital improvements were catalogued and the relative financial feasibility was tested for each land use within each geographic planning area.

After the General Plan was adopted, Angus McDonald and Associates was retained to prepare a detailed Major Projects Financing Plan that incorporated all capital improvements necessary to implement the General Plan plus other expenditures (e.g., for periodic updates of the General Plan and for facilities master plans) for which long-range financial planning was necessary.

Sales Tax Revenue Forecasts
for Santa Clara County's "Measure A" Program

Angus McDonald & Associates was responsible for preparing an econometric model to forecast sales tax revenue for the Santa Clara County Traffic Authority. The Authority came into being when Santa Clara County's voters enacted an additional 0.5 percent retail sales tax to be used to finance three major transportation improvements. The duration of the tax was exactly ten years. Angus McDonald & Associates had the responsibility to prepare econometrically-based estimating relationships to relate estimates of growth in population and growth in employment to the sales tax revenues that can be anticipated for the next ten years. The point of this highly detailed analysis was to assure that the Authority's program was realistic, given expectations about available revenue. The analysis considered "external" variables, such as shifts in location of major retail centers, as well as producing estimating relationships derived from historical data.

Expert Testimony for the City of Alameda

The City of Alameda was in litigation with an individual who contracted to provide rehabilitated housing in exchange for financial support from the City. Angus McDonald & Associates was retained to evaluate the economic substance of the transaction, as it actually emerged, and to estimate the extent of which the City had been damaged. The economic analysis was completed and expert testimony at trial was held in July 1988.

Angus McDonald & Associates was also retained to evaluate the economic impact on the City of a Traffic Management Ordinance that had been proposed by voter initiative. A particular issue was the effect of the Traffic Management Initiative on the security of assessment bonds that had previously been approved at the Alameda Marina Village Project, a project where Angus McDonald & Associates had previously participated in design of the financing plan. Testimony was presented regarding the effects of the proposed initiative and regarding a response strategy by the City if the initiative had been approved by the voters.

San Ramon Downtown Specific Plan and Environmental Impact Report

Angus McDonald & Associates was part of the team that prepared a Specific Plan for San Ramon's rapidly-developing downtown. Significant issues included financial feasibility, market support, aesthetics, traffic control, and urban design. Angus McDonald & Associates' responsibilities were in three areas: market support, fiscal analysis and financial feasibility.

Estimates of overall market capture by the downtown were prepared, based upon review of regional and County-wide data. These estimates were utilized to assist in specifying the land use mix for alternative Specific Plan scenarios. The preferred Specific Plan then became the subject of a fiscal impact analysis to identify any potential cost/revenue impacts and required mitigation measures. Finally, a financing plan was prepared for the Specific Plan indicating the overall magnitude of capital improvement requirements and the most equitable ways of financing those requirements.

King City Economic Development Strategy and Brochure

The City of King retained Angus McDonald & Associates to prepare an economic development strategy and action plan. A shift/share analysis, as well as industrial employer and realtor surveys were used to identify target sectors which offered opportunities for economic growth and to identify impediments to the City's economic development. Procedures were set up to generate current information (on sites, labor force, competitive advantage, etc.,) which would be relevant to a potential employer. Various means of providing economic assistance to industry, through Federal, State or local funding and access to low-cost municipal financing were compiled as part of the data base available to potential employers. A marketing brochure was prepared which would be effective in soliciting new business activity in King City and in responding to inquiries. Major emphasis was placed on developing an ability within the City administration to maintain an up-to-date analysis of its economic base and to respond rapidly and positively to potential employers. An Economic Development Opportunity Conference was held in May 1985, to generate interest among realtors and new industries about potential industrial locations in King City, as well as to familiarize local officials with economic development tools.

Florintown Revitalization Study

Angus McDonald & Associates, as part of the team which prepared the land use plan, estimated incremental property tax revenue resulting from formation of a proposed redevelopment project area. The proposed project area, located in Sacramento's historic Florintown area, would have been the focus of historic preservation efforts and improvements to public infrastructure. After surveying the area and estimating parcel-based incremental revenue, Angus McDonald & Associates recommended that the project area be enlarged in order to generate sufficient funds for desired public improvements.

North Natomas Community Plan EIR

Angus McDonald & Associates was part of the team that prepared a comprehensive evaluation of development potential for a 14,300 acre area east of the Sacramento Metropolitan Airport. The firm's involvement included definition of market potential, fiscal analysis, and a preparation of a public facilities financing plan. The interaction of the team produced alternative sketch plans that attempted to balance all realistic concerns. Since major sites in adjoining areas were also being studied for development, market research to determine sources of investment and ability to capture market share from other potential locations was an important part of the study. Critiques were solicited from City and County staff and other interested parties. A detailed analysis of refined formal EIR alternatives was prepared. The analysis concentrated on the implications of phased public improvement financing for each alternative. The EIR presented a mitigated financing plan that dealt directly with potential financial impacts associated with proposed development.

Development Plan for Boreal Ridge Ski Area

A market analysis, feasibility study and a 10-year development program were prepared for a proposed beginner/intermediate ski area at Boreal Ridge, California. The program included a physical facilities expansion plan and a financial plan based on revenue and expenditure forecasts, on detailed consideration of future tax consequences and the availability of additional capital. Since the ski area's concept and market had not previously been tested in California, the conclusion of the feasibility study was a material factor in attracting initial investors. As the area prospered and continued to grow, Angus McDonald & Associates was retained by the Board of Directors to evaluate a major facilities expansion.

REPRESENTATIVE PROJECTS

Financing Public Facilities and Services

- Responsible for negotiating State and local roadway financing partnerships during four years' service as the California Transportation Commission's principal transportation finance consultant.

- Technical director of public facilities financing plans for the Laguna, Antelope and North Natomas areas in Sacramento County.

- Technical director of the team retained to prepare the Environmental Impact Report on the Los Angeles County General Plan, after the previous General Plan was invalidated by the courts.

- Alameda County's representative during financial negotiations for the proposed Las Positas New Town.

- Technical consultant during negotiations between the City of Atascadero and the County of San Luis Obispo over property tax transfer allocations.

- San Mateo County's expert witness on the relationship between zoning and land values on the San Mateo coast-side.

- Prepared the first quantitative estimates of supply, demand and price of transferable development rights for Sonoma County.

- Evaluation of governmental mechanisms to extend public services and to provide for inter-agency management of major capital improvement projects.

Financial Feasibility Evaluation of Development Projects

- Adviser to and negotiator for the City of Alameda on a proposed down-town/waterfront development which had asked for partial funding through the mechanism of a City Redevelopment Agency.

REPRESENTATIVE PROJECTS (Continued)

- Evaluation of the market support for alternative commercial and retail sites in the City of San Ramon, and analysis of the financial feasibility of competing proposals.

- Development plans for projects which featured an innovative link between recreation and/or lifestyle considerations and housing. The range includes ski areas in California and Alaska, water recreation sites on dams and lakes, and oceanfront development. Among the specialized features considered were varietal grape planting and establishment of a small winery, golf courses, marinas, agricultural mixed uses, and tourist-oriented recreation.

- Evaluation of the feasibility of business parks and mixed use projects which were located in unincorporated areas, compared to the alternative of having a nearby city annex those areas. These studies have been conducted in Monterey and Alameda Counties.

- Analysis of the impact of one stage of a development project on future stages. This type of study is useful in making realistic adjustments to development plans as the project acquires a track record.

FIELDS OF EXPERIENCE

Public Facilities Financing

Analysis of capital improvement and service requirements for Cities, Counties, school districts, and other special districts. Preparation of facilities and services plans, with emphasis on public/private cooperation in financing. Examination of alternative financing plans and construction phasing. Recommendation of strategies for implementation of an adopted facilities financing plan.

Transportation Systems

Participation in planning roadway improvements and developing alternative transportation strategies for rapidly expanding metropolitan areas. Analysis of public transit and para-transit operations. Evaluation of existing systems, and recommendations for infrastructure and transportation requirements projected as much as 50 years into the future.

FIELDS OF EXPERIENCE (Continued)

Investment Economics

Market analysis and financial feasibility studies of commercial, recreation and residential developments. Analysis of after-tax investment consequences for tax-motivated individuals. Development of computer models for investment analysis.

Economic base studies and forecasts of regional economic activity. Analysis of direct and induced economic impacts using techniques of input/output analysis. Evaluation of demographic/economic relationships and trends in labor force participation and household formation.

Recreation Economics

Evaluation of demand for outdoor recreation facilities in both public and private recreation areas. Development of priority setting procedures to guide parks, recreation and open space capital improvement programs. Financial planning for park and recreation projects and systems.

PROFESSIONAL HISTORY

Private Consulting Practice

1964 to Present	Angus McDonald & Associates and predecessor firms: Associate, then Principal

Private Industry

1958 to 1963	Engineer, Shell Development Company

Research

1963	Research Assistant, Department of Industrial Engineering and Operations Research, University of California, Berkeley

FIELDS OF EXPERIENCE

Fiscal Impact Analysis/Public Finance/Public Administration

- Developed fiscal/economic models to evaluate fiscal impact of proposed development projects for Cities and Counties in California. Prepared short- and long-range financial forecasts and multi-year budget models for local governments. Conducted feasibility analyses for new cities. Designed staffing plans, budgeting and financial management systems for local governments. Organizational and Management studies for cities, counties, and districts. Evaluated the effectiveness and cost of alternative forms of government organization. Prepared financial burden analyses for local governments and large-scale development projects.

Economic Development Forecasts

- Forecasted demand for industrial warehousing and commercial and retail space as part of a General Plan Fiscal Impact Analysis.

International Economics

- Research, public presentations and publications on Latin American debt, Central American economic development, and the effects of General Agreement on Tariffs and Trade agreements on foreign trade structure of the least developed African countries. Evaluated economic feasibility of small self-help development projects in Bolivia, El Salvador, Malawi, and Kenya. Guest Speaker on Third World development and politics at San Francisco State University, Department of International Relations.

PROFESSIONAL HISTORY

1988 to present	Analyst, Angus McDonald & Associates
1987 to 1988	Research Associate, Joanna Moss, Inc.

EDUCATION

M.A., Honors, Applied Economics, San Francisco State University, 1987

B.S., Economics, University of California, Berkeley, 1985

ATTACHMENT

Proposal To Prepare
An Initial Environmental Study

Geier & Geier Consulting, Inc.
P.O. Box 5054 • Berkeley • California • 94705-5054 • (415) 644-2535 • Fax (415)540-7273*

June 13, 1990

Mr. Angus McDonald
Angus McDonald & Associates
1950 Addison St.
Berkeley, CA 94704

SUBJECT: PROPOSAL TO PREPARE AN INITIAL STUDY FOR THE INCORPORATION OF TRUCKEE, NEVADA COUNTY

Dear Angus:

Geier and Geier Consulting, Inc. (GGC) is pleased to provide this proposal to prepare an Initial Study for environmental review process in connection with the incorporation of Truckee. These services would be in conjunction with McDonald & Associates' preparation of a feasibility study and comprehensive fiscal analysis for the incorporation of Truckee in Nevada County.

Mr. Frederick Geier of GGC will be responsible for the preparation of the Initial Study and related procedural documents. He has completed several Expanded Initial Studies for the cities of Morgan Hill and Alameda. In addition to these environmental documents, Mr. Geier has prepared and contributed to over 150 EIR's/EIS's for projects throughout northern California. Ms. Valerie Geier will serve as Technical Director for this project and has considerable local experience. Together, the principals of GGC have completed over 15 environmental and economic studies in Nevada County. Local project experience in Nevada County is listed in Attachment A of this proposal. At present, Mr. Geier is responsible for the economic analyses presented in the DEIS for the Sugar Bowl Ski Resort Master Plan. These analyses include an evaluation of the effects of ski resort expansion on the local economy, including the community of Truckee.

GGC currently prepares Initial Studies, Expanded Initial Studies and Mitigated Negative Declarations on a retainer basis for the Town of Los Gatos. Over the past 12 years, Ms. Valerie Geier of GGC has completed over 30 Initial Studies for residential, commercial, and industrial projects proposed in the Town. In addition, GGC has been preparing Initial Studies, Expanded Initial Studies, and Negative Declarations on a regular basis for the cities of Walnut Creek, Morgan Hill, and Alameda; projects have included a church development proposal, rezoning of a portion of the downtown core area, a hotel/convention center proposal, and a wide variety of development projects.

Proposed Scope of Work

GGC anticipates that the environmental review process for the Initial Study will commence after the development of a project description sufficient to allow for CEQA review. This would include the definition of incorporation boundaries and the specification of all services to be provided by the new city. During this process, GGC will review any previous environmental analyses related to earlier incorporation proposals. GGC will also consult with Mr. David Shpak and other staff members of the Nevada County Planning Department to obtain all relevant environmental and planning information currently being developed as part of the General Plan Update. Additionally, GGC will use the public scoping meetings as an opportunity to solicit comments related to environmental and planning issues. The completion of these tasks will then permit the preparation of the Initial Study for the incorporation proposal.

The process of incorporation for the community of Truckee will have no direct significant adverse impacts on the environment. However, the California Environmental Quality Act (CEQA) specifies that secondary impacts resulting from a project also need to be addressed in the environmental review process. Municipal incorporation qualifies as a "project" under the CEQA definition of a project.

To the extent that the proposed incorporation could have potential effects on land uses and public services in the community of Truckee, the incorporation could have secondary and/or indirect effects on the natural and man-made environment. The focus of the Initial Study's assessment will revolve around possible changes in the provision of services to the community resulting from the incorporation. The potential for enhanced services or increased service capacities could accelerate or induce additional growth in the community.

The proposed incorporation could have a significant effect on potential changes in land use within the new city. The Initial Study would identify the extent of undeveloped lands which could be affected by changes in land use policies. A detailed evaluation of the land use impacts would be appropriate as a part of the General Plan process required by state law after incorporation.

The completed Initial Study will recommend either the preparation of an EIR or a Negative Declaration. An EIR will be necessary if significant adverse environmental effects result from the proposed project. If no significant adverse environmental effects derive from the proposed incorporation, then the environmental review process specifies the preparation of a Negative Declaration. The Negative Declaration is then subject to a 30-day public review period prior to approval by a decision-making body.

The Scope of Services for this project includes the review of all relevant background studies (e.g. General Plan Update technical analyses), attendance at one public scoping meeting, consultation with all County staff, preparation of the Initial Study, and submittal of a Negative Declaration for distribution by County LAFCO. In the event that an EIR is required, GGC would provide a separate Scope of Work and cost estimate for consideration by LAFCO.

Schedule

Once authorization to proceed and background information (listed below) are received, work products and schedule are proposed to be as follows:

• Submittal of 20 copies of the Initial Study	4 Weeks
• Submittal of the Negative Declaration	2 Weeks after Approval of Initial Study

The time required for administrative review by staff is at the discretion of the LAFCO.

Personnel

Geier & Geier Consulting, Inc. (GGC) is an environmental planning and urban economics firm offering a full range of environmental services related to land use planning and development. Based in Berkeley, California, the firm's areas of expertise include environmental assessment and documentation. Together, the principals of GGC bring over 20 years' experience to the field and have been responsible for completing over 200 environmental documents and technical studies. GGC is a minority/women's business enterprise (M/WBE). The firm's environmental analysis capabilities include:

- Preparation of Initial Studies and Environmental Impact Reports for specific and area plans and for development projects in accordance with CEQA guidelines
- Completion of Environmental Assessments and Environmental Impact Statements for federally-funded studies and road projects in accordance with NEPA guidelines and FHWA requirements
- Completion of planning-level air quality, acoustical, water quality and hydrological studies for environmental documents
- Completion of phase one site assessments and public health analyses for environmental documents

The principals of GGC are dedicated to providing personalized and responsive service to each client. With a working knowledge of current environmental regulations and extensive project experience, GGC is capable of providing a broad range of services to each client.

Professionals associated with GGC are committed to providing objective and comprehensive data and analysis that is tailored to each client's needs. One of our key objectives is to find feasible and realistic solutions to land use conflicts or environmental impacts posed by project development.

Mr. Frederick Geier, Principal of GGC, will be responsible for evaluating the potential environmental effects of the proposed incorporation, agency contacts, and the preparation of the Initial Study and Negative Declaration. His experience and expertise are familiar to County Planning staff. Specific projects and capabilities are discussed both above and in the attachments to this proposal.

Costs

The preparation of the Initial Study as outlined above would be completed for a fee not to exceed $5,800. This cost estimate assumes that copies of the existing background studies for previous incorporation efforts would be provided for our review, and a comprehensive project description with appropriate mapping would be supplied for use in the Initial Study.

County Responsibilities

In order to complete the work program for the Initial Study according to the proposed schedule, the following items and information will be needed prior to the completion of the Initial Study:

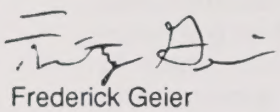
- copies or access to all background studies prepared during previous incorporation analyses;
- a definitive project description for the proposed incorporation, including boundaries and other pertinent information related to the proposal.

It is assumed that the County will be responsible for the coordination of public scoping meetings, distribution of the Initial Study, the compilation of public comments on the Initial Study, and noticing requirements for the Initial Study and, if applicable, the Negative Declaration.

Certifications

This proposal is a firm offer for a 90-day period. Work performed under this proposal will be performed on a not-to-exceed basis.

Sincerely,
Geier & Geier Consulting, Inc.



Frederick Geier
Principal

Attachment A

Project Experience

Local Project Experience

Nevada County

Commercial Developments

Nevada City Investment Company Mixed-Use Development (City of Nevada City)

This EIR dealt with a rezoning and General Plan amendment request on 40 acres in Nevada City. Commercial, light industrial, professional/office and residential uses were proposed. Major on-site constraints included slope/ground instability due to steep slopes and abandoned mine shafts, ponding/flooding hazards, and riparian zones. Potential traffic congestion problems, increased noise, and land use compatibility were the major off-site environmental issues. During the course of study, development alternatives were recommended which mitigated many of these environmental issues. Ms. Valerie Geier served as project manager and was responsible for completing this EIR.

Wolf Creek Plaza Shopping Center (City of Grass Valley)

As project manager, Ms. Geier was responsible for preparing this EIR which dealt with a proposal to develop a 171,436-square-foot shopping center for retail commercial uses on a 23.61-acre parcel located between Nevada City and Grass Valley. Proposed improvements included development of buildings, parking lot, landscaping, access driveways, service corridor, new street at the southwest boundary, and completion of off-site road and utility improvements. Development of the proposed project would contribute significantly to cumulative changes in local traffic conditions as well as result in changes associated with air quality, noise conditions, hydrology, services and fiscal impacts.

Fowler Commercial Shopping Center Development (near Grass Valley)

This EIR addressed the potential environmental effects resulting from a commercial development proposed on a 14.9-acre parcel located in the Glenbrook area of Nevada County. The project sponsor proposed to change the General Plan land use designations. The proposed project would be subject to certain constraints and result in some adverse environmental effects. The most significant impacts identified in this report related to potential land use conflicts, drainage, traffic, and water service. Ms. Geier served as project manager and was responsible for completion of this EIR.

The Junction Commercial Center (Truckee)

This EIR Supplement addressed the potential environmental effects resulting from development of a proposed shopping center on a 14-acre site located northeast of downtown Truckee at the junction of Highway 267 and Interstate 80 (I-80). The project sponsor proposed to develop a 105,932-square-foot shopping center containing a variety of retail commercial uses. The most significant impacts identified in this report related to potential land use conflicts, visual impacts, traffic, and cultural resources. Ms. Geier was project manager and responsible for completing this EIR.

The original EIR included a market evaluation of Truckee area and determined that the project would be feasible. As part of the EIR Supplement for this project, the County determined that there should be a closer analysis of the market demand for various commercial uses and the

existing supply as provided by the downtown merchants and satellite commercial centers in the area. Mr. Geier was responsible for conducting the additional evaluation which included a survey of all commercial development in the Truckee community and comparing this supply with the demand for commercial uses. The analysis examined all commercial retail sectors to determine the types of demand which were not adequately served by prevailing commercial uses and those areas which were adequately represented. This subsequent study indicated that the major commercial uses proposed as part of the project would supply an unmet demand for certain commercial activities.

Sugar Bowl Recreation Area (County of Nevada)

GGC is currently completing the economic analysis for an EIS sponsored by the Tahoe National Forest. The evaluation addresses the demand for expanded ski resort facilities in the Donner Summit area. The assessment of economic conditions includes a review of market conditions, an indication of project success, and an analysis of the project's fiscal impacts upon local and regional agencies with jurisdiction over the project area. GGC's involvement requires an evaluation of the proposal's overall effects on social conditions such as population, housing, and employment. The study also entails a determination of the project's effects on local services and utilities.

Auburn Highway Commercial Center Study

GGC was responsible for evaluating the fiscal impacts of a mixed commercial use proposal in the City of Auburn. The project involved development of a five-story hotel/conference center, sit-down restaurant, fast-food restaurant, and gas station/convenience mart on approximately five acres. The project site was located adjacent to a major interchange on Interstate 80.

Residential Developments

Stonebridge Estates (Nevada City)

GGC is currently completing a Focused EIR for a proposed 47-lot subdivision on 75 acres located east of Nevada City. The EIR is focused on traffic, circulation, and noise issues. Although an infill development, project-generated traffic incrementally contributed to existing and future traffic congestion and noise problems on roads and at intersections providing access to downtown Nevada City and the freeway. The primary issue was whether the project should be denied since the only mitigation, a new bypass road, was not feasible as part of this project even though the project's traffic contribution was insignificant.

Felton Woods Residential Subdivision (Donner Lake)

Ms. Geier was project manager and responsible for completing this EIR which evaluated a 50-lot residential subdivision located at the west end of Donner Lake. The 50-acre site was subject to avalanche and flood hazards. Project development would have resulted in the partial loss of sensitive riparian and meadow plant communities. Frederick Geier was responsible for the hydrologic analysis.

Wolfe Estates Residential Subdivision (Donner Lake)

As project manager, Valerie Geier was responsible for completing an EIR for a 48-lot subdivision proposed on steep slopes above Donner Lake. Critical issues were water quality, traffic safety, visibility and tree removal, and protection of wetlands and riparian habitat on the site.

Martis Valley Meadows Residential Subdivision (Truckee)

Prepared an EIR for a 92-unit subdivision on a 17-acre parcel located immediately adjacent to Highway 267 southeast of Truckee. Its proximity to the airport and highway posed noise and traffic problems. Major constraints to the development included cumulative traffic congestion problems in downtown Truckee and insufficient sewage treatment capacity. Valerie Geier served as project manager while Frederick Geier contributed to the biotic, hydrologic and public services components of this EIR.

Martis Valley Estates (Truckee)

As project manager, Valerie Geier was responsible for preparing this EIR which dealt primarily with land use constraints of developing 112 lots on 39 acres in Truckee. This site was located adjacent to sewage treatment ponds, the sanitary district's heavy equipment storage area, and within the clear zone of the main runway at the Truckee-Tahoe Airport. Frederick Geier was responsible for the biotic, hydrologic and public services sections of this EIR.

Industrial Developments and Institutional Projects

Deerfield Bypass/Pioneer Village (Truckee)

Ms. Geier is currently responsible for completing the EIR for a proposed road project located in Truckee. As part of a motel development proposal, the project sponsor proposes relocation of a through route designated by the Circulation Element of the General Plan. This route is regionally significant and its relocation to an undeveloped area poses potentially significant, growth-inducing impacts. The EIR evaluates four alternative road corridors and focuses on the following issues: traffic and circulation, land use compatibility, planning considerations, water quality and effects on riparian, meadow and pond (wetlands) habitats.

Proposed Church and Related Facilities, Church of Jesus Christ of Latter Day Saints (near Grass Valley)

GGC is currently responsible for preparing an EIR for a proposed church facility. The Church of Jesus Christ of Latter Day Saints proposes to develop a new church and related facilities in an existing residential neighborhood. The church would require development of an on-site well and a septic sewage disposal system. Environmental issues include: traffic, visual quality, land use compatibility, groundwater supply and quality, and potential drawdown of adjacent wells. Significant public concern required close coordination between GGC and neighborhood groups.

Nevada County Government Buildings Expansion (City of Nevada City)

This EIR focused on six development alternatives proposed by the County to meet the County's immediate, short-, and long-term office space needs. Since these alternatives were very preliminary in nature, the analysis involved design of conceptual site plans, calculation of space needs with each alternative and combinations of these alternatives, and feasibility of each and combinations of these alternatives from an environmental, political, and economic standpoint. Under each section, the alternative with the least environmental constraints was identified and at the report conclusion, the preferred alternative was recommended based on economic, political, and environmental constraints. Valerie Geier was project manager while Frederick Geier completed the hydrologic analysis.

Nevada County Administration Center (City of Nevada City)

Ms. Geier served as project manager and was responsible for preparing this EIR which evaluated the impacts of developing a two-story, 100,000 square-foot County Center in Nevada City. The site was located in a residential area adjacent to a scenic highway and was considered the "entryway" into Nevada City. Critical issues included visual impacts, land use compatibility, traffic and access, noise, drainage, and cumulative impacts.

El Oro Drift Placer Mine (San Juan Ridge)

Ms. Geier served as project manager and was responsible for this EIR which evaluated an open pit gold mine including several tunnels. Critical issues included vegetation and wildlife, erosion, and downstream effects on fisheries. Controversy and concern over the project were also substantial. Prepared detailed mitigation measures to reduce impacts and ensure successful reclamation of the site.

Relevant Project Experience

Alameda County

Commercial Developments

Ballena Hotel and Convention Center (City of Alameda)

Geier & Geier Consulting, Inc. (GGC) assisted City staff in completing the Initial Study and Request for Proposal for a proposed hotel development in Ballena Bay. Our services included identifying environmental issues and scope of environmental analysis required for the EIR based on the concerns raised by previous development proposals, concerns expressed at a public scoping meeting, and responses to the Notice of Preparation.

Sports/Fitness Club Market Feasibility Study (Private)

This market analysis for a fitness club examined the potential for establishing a luxury sports/ fitness facility in Alameda County. The private client was interested in determining the level of market support such a facility in a specific geographic area. The analysis included an inventory of existing similar facilities, reviewed plans for this type of use in the various communities affected by the proposal, and estimated the level of demand for this use in the market area.

King Avenue Shopping Center Market Feasibility Study (City of Fremont)

The objective of this study was to determine appropriate land uses for an eight-acre area in the vicinity of Mission Boulevard and King Avenue. The City of Fremont was considering an amendment to its General Plan which would redesignate the land use for this area from residential to retail commercial. This market analysis examined the level of support for two alternative retail uses: a neighborhood shopping center and a convenience center. The analysis described the project area, the type of commercial centers under consideration, the trade area in the vicinity of the study area, and the demographic and income characteristics of the trade area. Mr. Geier served as project manager and was responsible for completion of this project.

Institutional Developments

Alameda Library (City of Alameda)

GGC assisted City staff in completing the Initial Study and Request for Proposal for the proposed construction of a new library and re-use of the existing Andrew Carnegie Library Building (a designated historic library). Our services included identifying environmental issues and scope of environmental analysis required for the EIR based on the concerns raised by the Planning Commission, concerns expressed at a public scoping meeting, and responses to the Notice of Preparation.

Planning Projects

Albany Waterfront Specific Plan EIR (City of Albany)

This project involved the analysis of future housing and commercial demand for a mixed use development proposed on Santa Fe lands along the Albany waterfront. As part of an EIR, the assessment included an evaluation of market conditions for hotel uses at the site as well as an analysis of the costs of providing services to the property. The review of fiscal impacts on the City addressed both the immediate and long-term revenues from the project.

Contra Costa County

Initial Studies

Capital Improvement Projects (City of Walnut Creek)

GGC has been responsible for completing over 11 Initial Studies and Negative Declarations on a wide variety of capital improvement projects proposed by the City of Walnut Creek. Improvement projects include park-and-ride facilities, golf course improvements, park improvements, storm drain construction, development of a stock pond/earthen dam, and sidewalk and fence construction projects.

Walnut Creek Church of Christ (City of Walnut Creek)

GGC completed an Expanded Initial Study for a use permit application which would allow continued operation of a church and development of new facilities at an existing private school. Primary issues focused on residents' concerns over potential traffic and noise impacts that could result from increased intensity of site use. The Initial Study outlined all activities of the church and school and the combined impact of all activities at this site were evaluated on a daily and weekly basis as well as for major annual events.

Residential Developments

Bernstein/Broadmoor Expanded Initial Study (City of Concord)

Ms. Valerie Geier served as project manager and was responsible for completing the Initial Study which assessed the effects of developing 260 attached single-family residential units and 14,000 square feet of commercial space located in south Concord at the intersection of two major roadways. Primary issues involved the compatibility of commercial uses adjacent to residential development and environmental constraints such as noise and traffic problems.

Bancroft Road Improvement Project Initial Study/Environmental Assessment (City of Walnut Creek)

Ms. Valerie Geier, as project manager, was responsible for completing an Initial Study/Environmental Assessment for proposed widening of Bancroft Road in Walnut Creek. Detailed air quality, noise, traffic, and historical studies were completed as part of this study. This study included preparing all necessary documentation to qualify an existing structure along this road for the National Register. This report required approval by the City, Caltrans as well as by the Federal Highway Administration.

Fresno County

Industrial Developments/Institutional Projects

Herndon, Villa and North Avenues Initial Studies/Environmental Assessments (for FHWA funding)

Completed Initial Studies/Environmental Assessments for three road improvement projects in the Fresno-Clovis Metropolitan area requiring Federal funding. Historical Property Survey Reports and environmental assessments were prepared in accordance with Caltrans and Federal Highway Administration environmental guidelines. Detailed noise, air quality, and archaeological

investigations were performed. Ms. Geier served as project manager and was responsible for this EIR.

Santa Clara County

Initial Studies

Development Projects (Town of Los Gatos)

GGC is currently serving on a retainer basis as an environmental consultant to the Town of Los Gatos. Ms. Geier has completed over 35 Initial Studies, Expanded Initial Studies and Mitigated Negative Declarations for residential, office and commercial developments proposed within the Town. Ms. Geier was also responsible for completing the Expanded Initial Study for a proposed new library at the Town's Civic Center.

Commercial Developments

Tilton-Terracommercial (City of Morgan Hill)

This project involved the preparation of an expanded Initial Study for the addition of a proposed "R&D" industrial development adjacent to the urban service area of Morgan Hill. The development would ultimately augment the industrial base of the city. The primary concerns surrounding the project were the provision of adequate municipal services and utilities, particularly wastewater treatment capacity. Mr. Geier served as project manager and was responsible for completing this EIR.

Economic Impact Analysis for Proposed Shopping Centers (City of Morgan Hill)

As project manager, Mr. Geier was responsible for preparing this analysis which dealt with proposals for two shopping centers to be located on opposite corners of the Cochrane Road/Highway 101 interchange. The two centers differed somewhat in size, but were similar enough to permit analysis within the scope of one report. The purpose of this analysis was to: determine the ability of the market to support a new community or regional shopping center at the proposed sites; evaluate the proposed tenant mixes; analyze the effect of proposed centers on the Downtown and other shopping areas in Morgan Hill; and explore approaches and specific methods of improving downtown retail activity.

Residential Developments

Lands of Old Orchard Company (City of Morgan Hill)

Prepared an expanded Initial Study and Negative Declaration for a proposed 84-unit single-family residential development which was subject to growth control ordinances imposed on new development in the community. The principal issues addressed in the study included: 1) provision of adequate drainage for the site; 2) the preservation of significant oak trees on the property; and 3) the effects of additional traffic on regional and local residential streets.

Cottage Green Senior Housing Project (City of Morgan Hill)

Mr. Geier served as project manager and was responsible for preparing this expanded Initial Study for a proposed 116-unit residential development which was to serve persons 62 years of age or

older. The principal issues addressed in the study included: 1) provision of adequate drainage for the site; 2) the preservation of significant oak trees on the property; and 3) the effects of additional traffic on local residential streets.

Les Maisons Provencal (City of Saratoga)

GGC completed the fiscal analysis for this project. The project involved development of the former Paul Masson Winery property with 84 townhouses and a lifecare retirement community composed of 204 congregate apartments, 36 cottages, 60-bed personal care facility and a 60-bed skilled nursing facility. The study also included evaluation of various project alternatives including a low-density alternative and exclusive senior housing alternative.

Sacramento County

Planning and Park Projects

North Sacramento Community Plan (City of Sacramento)

As project manager, Mr. Geier was responsible for preparing an EIR for the North Sacramento Community Plan. The revised Plan would result in increased intensity of urban uses on vacant lands, transportation improvements to expand circulation capacities and a reduction in the supply of land designated for commercial uses. In addition to detailed evaluation of impacts on natural resources, detailed traffic and socio-economic studies were completed.

Mr. Geier was responsible for preparing the Fiscal and Socioeconomic sections of this EIR. The revised Plan would result in increased intensity of urban uses on vacant lands, transportation improvements to expand circulation capacities and a reduction in the supply of land designated for commercial uses. In addition to detailed evaluation of impacts on natural resources, detailed traffic and socioeconomic studies were completed.

Commercial Development

Longview Real Estate Analysis (City of Sacramento)

The subject of this study was a parcel situated in Del Paso Park between Longview Drive and Interstate 80. This analysis examined existing land uses for the subject parcel and surrounding properties, including an inventory of commercial uses in nearby areas, discussing the projected needs for various types of land uses in the communities around the subject parcel and addressing the issue of financial returns for each kind of land use. This report also evaluated the physical resources found on the property and identified the opportunities and constraints which were inherent in the parcel. Mr. Geier served as project manager and was responsible for this study.

City of Folsom Retail Commercial Use Study (City of Folsom)

Mr. Geier prepared this feasibility study which addressed rezoning a 32.7-acre parcel at the intersection of East Bidwell Street and Blue Ravine Road. The proposed uses were residential on 11.7 acres and commercial for the remaining 21 acres. The plans for commercial uses encompassed a community shopping center with four major tenants, several smaller shops, and six individual pads. During the environmental review process for this proposed development, certain issues were raised concerning the effects of this shopping center upon the community. These concerns included the impacts upon the existing supply of retail commercial uses in the

City, the effects of the project on vacant lands presently zoned for future commercial development, and the ability of the proposed shopping center to capture business from retail uses outside the City of Folsom.

Sacramento Community Convention Center Expansion, 13th and I Street Office Building, 13th and J Street Office Building, and 12th and K Street Office Tower (City of Sacramento)

Frederick Geier was responsible for preparation of fiscal and socioeconomic components of the EIR for these projects. This EIR evaluated the effects of four expansion alternatives for the Convention Center and the three high-rise office buildings (totaling 1,172,400 square feet of office and retail space). The EIR also assessed the effects of four development scenarios which involve developing the four expansion alternatives with different combinations of the three office developments.

Clunie Hotel/Renaissance Tower Office Building (City of Sacramento)

Mr. Frederick Geier was responsible for preparing the fiscal and socioeconomic sections of this EIR. The proposed development involved two separate and distinct actions. The first component of this proposal entailed the demolition of the Clunie Hotel. This building was a historic structure in downtown Sacramento. The second component involved the development of a 25-story structure on the 0.72-acre project site.

Northgate Station Office/Commercial Development (City of Sacramento)

The proposed project entailed the development of a mixed-use commercial development in the North Natomas area of Sacramento. The proposed development included several different commercial components. The various uses involved were: a hotel, office space, restaurants, and a day care center. Mr. Geier was responsible for preparation of the fiscal and socioeconomic components of this EIR.

Solano County

Planning and Park Projects

Paradise Valley Area-Wide Plan (City of Fairfield)

The formulation of an Area-Wide Plan for Paradise Valley required several phases from inception to completion. Responsible for the preparation of an environmental data base and identification of specific constraints to large-scale development. Principal issues involved the loss of agricultural soils and the provision of adequate public services. After the completion of the Area-Wide Plan and project design, an environmental assessment of the project was prepared. Development plans were further refined in response to identified concerns and then the EIR for the Area-Wide Plan was completed. Mr. Geier served as project manager and was responsible for completing this report.

Cordelia Area Specific Plan Update Program (City of Fairfield)

Frederick and Valerie Geier co-managed preparation of an EIR for the Cordelia Area Specific Plan Update Program. This EIR evaluated the effects of the existing Plan and three alternatives for development of a 5,600-acre area. These alternatives proposed different urban growth patterns,

mixes of land uses, and population levels. Key issues were public services/utilities, traffic and circulation, hydrology, biotic resources, loss of agricultural lands, and noise.

Cordelia Area Redevelopment Plan (City of Fairfield)

As project manager, Frederick Geier was responsible for preparing an environmental analysis for the redevelopment of the Cordelia area of Fairfield. The firm's role was to provide an assessment of effects of developing 8500 dwelling units, industrial areas, and commercial uses in Cordelia. The Plan also called for the redevelopment of the historic community center. The firm's principal responsibilities were in the topics of geology, hydrology, biotic resources, air quality, noise, and the visual impacts. The analysis evaluated the effects of development between the years 1982 and 2005.

City of Rio Vista General Plan (City of Rio Vista)

As project manager, Mr. Geier prepared this plan which involved the revision of the Land Use and Circulation Elements of the City's General Plan, and the formulation of a Parks and Recreation Element. Other responsibilities included the preparation of a General Plan EIR, the revision of the City Subdivision Ordinance, and updating the Zoning Ordinance. The planning process required the establishment of new areas of industrial and commercial expansion to facilitate future growth within the community. The project also provided an extensive environmental data base for the City and the area within its sphere of influence.

Sonoma County

Fiscal Analysis

Sonoma Wine Country Gateway Shopping Center

This project involved the analysis of the economic impacts of a factory outlet shopping center on the community of Petaluma. The City received applications for two new shopping centers and expressed concerns about the projects' effects on the downtown area as well as other commercial uses in the community. The analysis for this particular project examined the market for factory outlet shopping centers in the region and addressed the potential economic impacts of the proposal on the overall sales activities in the City. The assessment also indicated the fiscal impacts of the project on municipal and other public service agencies.

Attachment B

Resumes of Key Personnel

Frederick M. Geier

Professional Experience

Principal, Geier & Geier Consulting, Inc., Berkeley, California, 1988-Present.

Senior Associate, Economic and Planning Systems, Berkeley, California, 1987-1988.

Associate, Angus McDonald & Associates, Inc., Berkeley, California, 1985-1987.

Project Manager, Larry Seeman Associates, Inc., Berkeley, California, 1977-1985.

Statistical Research Assistant, Pacific Southwest Forest and Range Experiment Station, Berkeley, California, 1975-1977.

Principal Professional Responsibilities

Managed or contributed to over 150 environmental assessments and reports, general plans, specific plans, area-wide studies, and environmental planning studies for counties, cities and other local jurisdictions in Northern California.

Responsible for managing financial analyses, land use studies, and market feasibility studies for residential, commercial, recreational and industrial developments in the San Francisco Bay, Monterey Bay, and Sacramento areas.

Used numerous sources of demographic and economic data to estimate existing and future population, employment, and land uses for economic studies that forecast base and non-base employment by industry and occupational sector.

Analyzed requirements for public facilities of projects in various settings. Used interview techniques, computer models and a variety of other estimating procedures to assemble public services plans, project cost estimates and revenue forecasts.

Used business research methods to define specific management problems, identify and collect required data, analyze the available alternatives for problem resolution, and present conclusions in formal reports. Assessments include evaluation of return for specific projects and determination of feasibility.

Responsible for completing alternatives analyses in conjunction with Section 404 permit applications for proposed residential and commercial developments. Projects include a regional shopping center and a number of residential subdivisions in the Sacramento/Sierra foothills region. The analyses examine on- and off-site alternatives pursuant to requirements of Section 404 B(1).

Prepared vegetation analyses for numerous environmental impact studies as required by the California Environmental Quality Act. Biotic assessments evaluated effects of development projects on vegetative resources of undeveloped properties in the Truckee, San Francisco Bay, Monterey, and Fairfield areas.

Education

California State University at Hayward, MBA, Finance, Hayward, California, 1984.

University of California at Berkeley, BS, Forestry, Berkeley, California, 1977.

University of California at Berkeley, BA, English, Berkeley, California, 1972.

Valerie Chew Geier

Professional Experience

Principal, Geier & Geier Consulting, Inc., Berkeley, California, 1988 - Present.

Senior Associate, Baseline Environmental Consulting, Oakland, California, 1987 - 1988.

Project Manager, LSA Associates, Inc., Point Richmond and Newport Beach, CA, 1977 - 1987.

Independent Environmental Consultant, Berkeley, California, 1976 - 1977.

Research Assistant, George Poinar, Ph.D., Department of Entomology and Parasitology, University of California, Berkeley, California, 1975.

Principal Professional Responsibilities

Managed or contributed to over 150 Environmental Impacts Reports, Initial Studies/Environmental Assessments and environmental constraints analyses for jurisdictions throughout Northern California.

Responsible for managing environmental constraints analyses and land use studies for residential, industrial, commercial, public use, capital improvement, and mining developments in the Monterey and San Francisco Bay areas, Sierra foothills, and Central Valley region.

Contributed to transportation impact studies for EIRs/EISs including the EIS for the Navy's proposed closure of six bases in the San Francisco Bay Area.

Contributed to phase one site assessments including an assessment of a 17-mile corridor for a proposed light rail transit proposal (and various optional alignments) through five South Bay cities to determine the potential for encountering hazardous materials.

Managed or contributed to EIRs for capital improvement projects (e.g., proposed wastewater collection/storage structures (tunnels, boxes, and lines) under existing development in San Francisco and transit facilities planned by the Bay Area Rapid Transit District) and industrial projects (e.g., Chevron wastewater reclamation facility, hazardous waste treatment/disposal facility, a gypsum products manufacturing facility, and Santa Fe Railroad Maintenance facility).

Responsible for preparation of Environmental Assessments/Initial Studies for road improvement projects involving Federal funding.

Performed planning-level noise analyses utilizing available modeling techniques (including FHWA noise guidelines) for over 100 development and planning projects proposed throughout Northern California including a 1.8-million-square-foot retail center in downtown Oakland.

Conducted research in freshwater ecology at Mammoth Lakes and Berkeley, CA, and prepared comprehensive literature review in planning parameters for soil-related aspects of mining reclamation.

Education

University of California, Berkeley, graduate study, Soil Science, Berkeley, CA, 1980 - 1982.

University of California, Berkeley, BS *with Honors,* Conservation of Natural Resources (Biological Science Emphasis), Berkeley, CA, 1977.

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